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Utilizing Idea Boards as an Evaluation Tool

Hi. We're Sherry Campanelli, Program Compliance Manager and Laura Newhall, Clinical Training Coordinator, from the University of Massachusetts Medical School's [Disability Evaluation Services](#) (DES). As an organization, we are committed to following Lean principles to enhance our services for people with disabilities. Lean principles assist organizations to maximize value while minimizing waste. These principles can be used internally as we evaluate our own working processes, as well as externally in working through evaluations with external partners (as demonstrated in some of our previous [blogs](#) showcasing QI initiatives).

One Lean tool is the Idea Board which is utilized to eliminate waste and enhance efficiency by tapping employee creativity and knowledge, and engaging employees in problem solving. An Idea Board is a simple and efficient strategy for gathering and acting on employee suggestions to improve organizational processes. It provides a visible format to display and track ideas from inception to disposition.

An Idea Board is typically accompanied by a regular structured opportunity for staff to "huddle" to present, discuss, and plan for implementation of ideas. The Idea Board is a place to document ideas, assign tasks, check on progress, and record outcomes. Staff must provide their ideas in writing by briefly naming the problem and suggesting a possible solution.

IDEA CARD*	
Problem:	
Idea:	
Expected benefits:	
Originator:	Date Originated:
Team discussion date:	
Team decision:	
Reason for decision:	

*Sample Idea Card and Idea Board (below) developed and used at the University of Massachusetts Medical School



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- Builds synergistic solutions; employees who do the work have the most knowledge of where problems lie and how to do things better.
- Enhances communication among employees and builds morale.
- Empowers staff to be problem solvers in addition to problem identifiers.
- Provides a format for employees at all levels to give input into process improvement.

- Provide Lean orientation for all Idea Board participants prior to implementation.
- Meet on a regular basis to discuss ideas; keep meetings short and focused (5-30 minutes maximum).
- Include employees with common functions and responsibilities.
- Establish ground rules at the first meeting that are agreed upon by all participants.
- Ask for volunteers to facilitate and act as a buddy for each huddle with the goal of rotating this role among all members. The facilitator leads the huddle and the buddy supports the facilitator by documenting decisions/progress on the Idea Board.
- Begin huddles by encouraging members to share successes; provide opportunities for all members to participate.
- Supportive managers are key to successful implementation of ideas.
- Ensure that ideas that are implemented result in overall efficiencies and not just passing a problem to another department.

Rad Resources:

"Invest a few moments in thinking. It will pay good interest." ~Anonymous

"Your lean process should be a lean process." ~Author Unknown

"There is nothing so useless as doing efficiently that which should not be done at all." ~ Peter F. Drucker